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Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation Do not enter social security numbers on this form as it may be made public.

Name of foundation TOMME LEE HULME FOUNDATION, INC C/O HERTAGE TRUST COMPANY Planes and street of 7 to be named and an ord Service of 1 to 1			ndar year 2014 or tax year begin	ning OCT		, and ending	SEP 30, 201	Copen to Public Inspection
TOMME LEE HULME FOUNDATION, INC C/O RETTAGE TRUST COMPANY Number and street by P D Sea number of make a rod delivered to sheet addressed. 280 2 W COUNDRY CULID DRIVE By or time, state or promose, country, and Zife in foreign postal code OKLAHOMA CITY, OK 73156 Check all that apply: I limited return Anneoded re				ming OCI	. 1, 2014	, and ending		
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Back					-		22 724000	^
28.02 M COUNTRY CLUB DRIVE City of town, State or province, Country, and ZP or foreign postal code OKLAHOM CITY, OK 73155 G Check all that apply; Initial return Initial return Andrease Change Anne Change Anne Change Anne Change						18		<u> </u>
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Contributions, gifts, grants, etc., received 1.0, 067.	G	Chec	· · · · · · · · · · · · · · · · · · ·		$\overline{}$	ormer public charity	D 1. Foreign organization	ns, check here
H. Check byse of organization: XI Section 501(c)(3) event private foundation Section 4947(a)(1) nonexempt orbitation for the file of the fire sable private foundation Filt the foundation status was formated in from Part II, cot. (c), her 16) Section 4947(a)(1) nonexempt orbitation for the file of th			 -				2 Foreign organizations m	section the 85% test
Section 4947(a)(f), nonexempt characteristic description of the taxelie private (pundation) from Part II, col. (c), line 160 \$5.5, 0.15, Cart II, col.							check here and attach of	computation
Farm market value of all assets at end of year Jacounting method: Cherk (peochy) Fart II. col. (p., line 16) S Cherk (p., line 16) S	H_	_					E If private foundation st	atus was terminated
Contributions of the process of the part Color C		<u></u>	ection 4947(a)(1) nonexempt char			ation	under section 507(b)(1)(A), check here 🕨 🔲
Part I Aalysis of Revenue and Expenses (the fotal of amounts in column (g), cl., and of may not necessary depart the animal recommends (e). Revenue and operations of the column (g), cl., and of may not necessary depart the animal recommends (e). Revenue and operations of the column (g), cl., and of may not necessary departs and animal recommends (e). Revenue and operations of the column (g), cl., and of may not necessary departs and recommends (e). Revenue and operations (e). Revenue and operations of the column (g), cl., and co	I F	aır m	arket value of all assets at end of y		•	Accrual	F If the foundation is in a	60-month termination
Part I Analysis of Revenue and Expenses (a) Revenue and repenses per books (b) Not investment (c) Adjusted net income (case of mouth an object of personal person							under section 507(b)(1)(B), check here $ ightharpoonup$
1 Contributions, girts, grants, etc., received 2 Check X X X X X X X X X					mn (d) must be on cash b	basis.)	<u> </u>	· · · · · · · · · · · · · · · · ·
1 Contributions, girts, grants, etc., received 2 Check X X X X X X X X X	P	art l	Analysis of Revenue and Expe	nses (c) and (d) may not	(a) Revenue and			(d) Disbursements
Check X this fundation a stringured to stack 8 & 3 Interest on accurage and temporary cash in receivements	_		necessarily equal the amounts in colu	umn (a))	expenses per books	income	 	
Interest on axiongs and temporary		1	Contributions, gifts, grants, etc.,	received			N/A	
## Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 6a Net gain or (loss) from sale or assets not on line 10 b Gross analise price for all 111,333. 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain 9 Income modifications 10a and showances b Leas Cost of goods sold c Gross profit or (loss) 11 Other income 12 Total, Add lines 1 through 11 28,754. 28,754. 28,754. 13 Compensation of officers, directors, fusities, etc. 14 Other employee salenes and wages 15 Pension plans, employee benefits 16 Legal fees 17 Interest 18 Taxes 19 Interest 19 Depreciation and depletion 20 Coupancy 21 Travel, conferences, and meetings 22 Other expenses 24 Total operating and administrative expenses and disbursements. Add lines 24 and 25 44,547. 6,599. 36,757. 27 Subtract line 26 from line 12: a Excess of revenue over expenses and disbursements b Net investment income if respains, enter op.)		2		quired to attach Sch B			<u> </u>	
Sa Gross rents Sa Not rental income or (loss)		3	Interest on savings and temporary cash investments					
D Net rental moone or (bass) E Net rental gain E Net r		4	Dividends and interest from secu	ırıtıes	18,687.	18,687.		STATEMENT 1
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Date Comparison Compariso		Ь	Net rental income or (loss)					
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12 Total. Add lines 1 through 11 28,754. 28,175		11	Other income			171	FEB 01 2016	
13 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 15 Pension plans, employee benefits 16 Legal fees STMT 2 4 33 4 33 3 3 3 3 3		12	Total, Add lines 1 through 11		28,754.	28,754.		
14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 15 Accounting fees 15 Accounting fees 16a Legal fees 15 Accounting fees 16a Legal fees 17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 25 expenses. Add lines 13 through 23 26 Contributions, gifts, grants paid 27 Subtract line 26 from line 12: 28 Excess of revenue over expenses and disbursements 29 Not investment income (if negative, enter -0-) 20 Adjusted net income (if negative, enter -0-) 21 A 33				ustees, etc		5, 2717	ODEN	1,757.
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c Adjusted net income (if negative, enter -0-)						22,155.		
							N/A	
	4235				nstructions			Form 990-PF (2014)

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Form 990-PF (2014)	C/0	HE	RITA	ЭE	TRUS	T	COMP	ANY	

23-	7248893	Page 2
End o	f year	
(Value	(c) Fair Market	Value

F	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of	
=	Τ.	 	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	635.	<2.	
	ſ	Savings and temporary cash investments	32,875.	20,369.	20,369.
	3	Accounts receivable			
	1	Less: allowance for doubtful accounts			
	4	Pledges receivable ►]	J	
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	1	disqualified persons			
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts			
ş	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
⋖	10a	Investments - U.S. and state government obligations		- <u>-</u>	
	b	Investments - corporate stock	117,803.		
	C	Investments - corporate bonds STMT 5	103,411.	102,931.	106,956.
	11	Investments - land, buildings, and equipment basis			=
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 6	389,674.	505,307.	<u>528,692.</u>
	14	Land, buildings, and equipment: basis ▶		_	
		Less accumulated depreciation			
	15	Other assets (describe ►)			
	16	Total assets (to be completed by all filers - see the			
_	<u></u>	instructions. Also, see page 1, item I)	644,398.	628,605.	<u>656,015.</u>
	17	Accounts payable and accrued expenses			!
	18	Grants payable			
S	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ge	21	Mortgages and other notes payable			
	22	Other liabilities (describe)			
				_	
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
w		and complete lines 24 through 26 and lines 30 and 31.		ĺ	
ë		Unrestricted			
		Temporarily restricted			
Ä	26	Permanently restricted			
Net Assets or Fund Balances		Foundations that do not follow SFAS 117, check here			
ΣF		and complete lines 27 through 31.		_	
ş		Capital stock, trust principal, or current funds	0.	0.	
SSe		Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
ΪÀ		Retained earnings, accumulated income, endowment, or other funds	644,398.	628,605.	
ž	30	Total net assets or fund balances	644,398.	628,605.	
			644 200	600 605	
	31	Total liabilities and net assets/fund balances	644,398.	628,605.	
P	art I	II Analysis of Changes in Net Assets or Fund Ba	alances		
		<u></u>			
		net assets or fund balances at beginning of year - Part II, column (a), line 3	30		644 222
	•	agree with end-of-year figure reported on prior year's return)		1	644,398.
		amount from Part I, line 27a		2	<u><15,793.</u> >
		increases not included in line 2 (itemize)			0.
		nes 1, 2, and 3		4	628,605.
		ases not included in line 2 (itemize)			<u> </u>
6	<u> Total</u>	net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	umn (b), line 30		628,605.
					Form 990-PF (2014)

423511 11-24-14

2-story brick wa	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)					ow a Purc Don	cquired chase ation	(c) Date a (mo., da		(d) Date sold (mo., day, yr.)
1a CER ADDA GUED	CON OTHER				┼					
b SEE ATTACHED	STATEMEN	<u> </u>			┼					
d					+					
e					 					
(e) Gross sales price	(f) Depreciatio (or allowa			expense of sale					ın or (loss) (f) mınus (ç	j)
a										
b	<u> </u>									
C										
d					_					
e 111,333.			 	101,26	6.					10,067
Complete only for assets showing							J)	Gains (Co	ol. (h) gain n ot less than	ninus
(i) F.M.V. as of 12/31/69	(j) Adjusted as of 12/3			xcess of col. (i) r col. (j), if any					from col. (h	
a										
b					\dashv					
<u>c</u>					\dashv					
d					-					40.055
e	 				_+			·		10,067
Capital gain net income or (net ca		gain, also enter in (loss), enter -0- ir			}	2				10,067
Net short-term capital gain or (los	o) ac dafinad in coat	ione 1222(5) and	(6):		1					
	S) as ucillieu ili seci.	ions izzz(o) and			11	- 1				
If gain, also enter in Part I, line 8,		10113 1222(0) and 1	\- /-		M	ł				
If gain, also enter in Part I, line 8, If (loss), enter -0- in Part I, line 8 Part V Qualification U or optional use by domestic private	column (c). nder Section of foundations subject	4940(e) for F	Reduced				ent Inc	ome	N/A	
If gain, also enter in Part I, line 8, If (loss), enter -0- in Part I, line 8 Part V Qualification U For optional use by domestic private section 4940(d)(2) applies, leave the foundation liable for the sect "Yes," the foundation does not qual	nder Section of foundations subject his part blank. Ition 4942 tax on the offy under section 4949	4940(e) for F to the section 494 distributable amout 40(e). Do not com	Reduced 40(a) tax or unt of any you	n net investment in ear in the base per art.	come.		ent Inc	ome	N/A	Yes X No
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TOMMIE LEE HULME FOUNDATION, INC

18 Eveript operating foundations discerbed is section 4940(d)(2), chack here ▶	_	m 990-PF (2014) C/O HERITAGE TRUST COMPANY 23 - 724 art VI			Page 4
Dates for funding or determination letter: (attach copy of letter if necessary-see instructions) b Domestic foundations that met the section 4940(e) requirements in Part V, check here \(\) and enter 1%, of Part I, line 27b. All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, ob. (b). Tax burdes section 511 (domestic section 4947(a)(1) trusts and baseble foundations only. Others enter -0-) 3 Add lines 1 and 2 Subtitle A (income) lax (domestic section 4947(a)(1) trusts and baseble foundations only. Others enter -0-) 4 A 0. 5 Tax based on investment income. Subtract line 4 from line 3.1 trac or liess, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 trac or liess, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 trac or liess, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 trac or liess, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 trac or liess, enter -0- 6 Better propresents and 2013 overpayment credited to 2014 5 Exempt foreign organizations - tax withheld at source 6 Tax pad with application for extension of time to file (Form 8868) 6 Earter any penalty for undersyperment of estimated tax b 16 feb 1	12				
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b If "Yes," did it have excess business holdings in 2014 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that

Form 4720, to determine if the foundation had excess business holdings in 2014.)

had not been removed from jeopardy before the first day of the tax year beginning in 2014?

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

N/A

3b

4a

Form **990-PF** (2014)

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TOMMIE LEE HULME FOUNDA			22 72400	,	, j
Form 990-PF (2014) C/O HERITAGE TRUST COMP Part VII-B Statements Regarding Activities for Which	ANY Form 4720 May Be	Required (control	23-72488	393	Page 6
5a During the year did the foundation pay or incur any amount to:		- ioquii ou (comi	,,,ded)		
(1) Carry on propaganda, or otherwise attempt to influence legislation (sect	tion 4945(e))?		res X No		
(2) Influence the outcome of any specific public election (see section 4955)					
any voter registration drive?	,, , - , ,		es X No		
(3) Provide a grant to an individual for travel, study, or other similar purpos	es?		es X No		
(4) Provide a grant to an organization other than a charitable, etc., organization					
4945(d)(4)(A)? (see instructions)		Y	es X No	1	
(5) Provide for any purpose other than religious, charitable, scientific, literal	ry, or educational purposes, or	for			
the prevention of cruelty to children or animals?		Y	'es X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify to	inder the exceptions described	I in Regulations		}	
section 53.4945 or in a current notice regarding disaster assistance (see ins	tructions)?		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check	k here				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption	ı from the tax because it maint	ained			- 1
expenditure responsibility for the grant?]	N/A 🔲 Y	es No		
If "Yes," attach the statement required by Regulations section 53.49)45-5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, t	o pay premiums on			1	İ
a personal benefit contract?		Y	es X No	ļ	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a	a personal benefit contract?		_	6b	X
If "Yes" to 6b, file Form 8870.					
7a At any time during the tax year, was the foundation a party to a prohibited tax		Y	es X No		
b If 'Yes,' did the foundation receive any proceeds or have any net income attri				7b	
Part VIII Information About Officers, Directors, Trus Paid Employees, and Contractors	stees, Foundation Ma	anagers, Highi 	y 		
1 List all officers, directors, trustees, foundation managers and the			17.00		
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	acco allo	Expense unt, other owances
JUNE POWELL	PRESIDENT/TRI	EASURER			
2802 W COUNTRY CLUB DRIVE		1	1		
OKLAHOMA CITY, OK 73156	0.00	0.	0.		0.
TREVOR POWELL	_DIRECTOR				
2802 W COUNTRY CLUB DRIVE					
OKLAHOMA CITY, OK 73156	0.00	0.	0.		0.
HERITAGE TRUST CO.	DIRECTOR				
2802 W COUNTRY CLUB DRIVE			}	l	_
OKLAHOMA CITY, OK 73156	1.00	7,028.	0.		0.
	-	1	1	}	
2 Compensation of five highest-paid employees (other than those in	ocluded on line 1) If none	enter "NONE "	L	l	
	(b) Title, and average	C.T.C. ITOITE.	(d) Contributions to		Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	acco	unt, other wances
NONE	devoted to position		compensation	- 4110	
	7				
	 				
	1				
	_				
	<u> </u>	I			
Total number of other employees paid over \$50,000		 		000 -	0
			Form	990-P	PF (2014)

Form **990-PF** (2014)

Total. Add lines 1 through 3

All other program-related investments. See instructions.

Form 990-PF (2014)

C/O HERITAGE TRUST COMPANY 23-7248893

Ŀ	Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	ndations, s	ee instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	669,522
b	Average of monthly cash balances	1b	28,810.
C	Fair market value of all other assets	1c	
đ	Total (add lines 1a, b, and c)	10	698,332.
е	Reduction claimed for blockage or other factors reported on lines 1a and		-
	1c (attach detailed explanation) 1e 0 •		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	698,332.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	10,475.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	687,857.
6_	Minimum investment return. Enter 5% of line 5	6	34,393.
Р	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	34,393.
2a	Tax on investment income for 2014 from Part VI, line 5		
b	Income tax for 2014. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	443.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	33,950.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	33,950.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	33,950.
P	Qualifying Distributions (see instructions)	-	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	36,757.
þ	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	_ _
þ	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	36,757.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		_
	income. Enter 1% of Part I, line 27b	5	<u> </u>
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	36,757.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation q	ualifies for th	ne section

Form **990-PF** (2014)

Part XIII Undistributed Income (see instructions)

1 Destributable amount for 2014 from Part XI, Inte 7 2 to-insulable amount for 2014 from Part XI, Inte 7 2 to-insulable amount for 2013 only 3 10.0 for pror years. 3 Excess distributions carryover, 4 any, to 2014; afrom 2009 5 From 2010 6 From 2011 6 From 2012 3 _ 656_ 6 From 2011 6 From 2012 3 _ 657_ 7 7 Total of lines 3 through 6 7 Total of lines 3 through 7 8 Applied to 2015, but not more than line 2 a byogaid to underthibuted morome of prior years (Election required - see institutions) 7 Total of distributions of tot corpus 6 7 Total of distributions of tot corpus 6 8 Center and through 6 9 Cente		(a)	(b)	(c)	(d)
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2. Understuded recome if any, as of the set of 2014 and a first amount for 2013 only b folial for prior years: 3. Excess distributions carryover, if any, to 2014: a from 2009 b from 2010 f a from 2010 f a from 2011 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2012 f a from 2013 f a from 2014 f a from 2014 f a from 2014 f a from 2014 f a from 2015 f a from 2014 f a from 2015 f a from 2016 f a from	, i				33 050
a Enter amount for 2013 only b Total for pron years 1 Excess distributions carryover, if any, to 2014: a From 2010 b From 2010 b From 2011 d From 2012					33,330.
\$ Total for prior years: 3 Excess distributions carryover, if any, to 2014:	1			^	
3 Excess distributions carryover, if any, to 2014; a From 2009 b From 2010 d From 2011 d From 2012 3, 656, e From 2013 1, 917. f Total of lines Sa through e 4 Dualshing distributions for 2014 from Part XII, line 4: P \$ 36,757, a Applied to 2013, but not more than the 2a Applied to undistributed more of pror years (Election required - see instructions) d Applied to 0 (distributions out of corpus (Election required - see instructions) d Applied to 10 distributions amount e Remaining amount distributed out of corpus 5 Cureas distributions carryove explient to 214 eff an amount special in solution (di. the same amount e Remaining amount distributed out of corpus 1 Center the net total of each column as indicated teleprocess in solution (di. the same amount eff and from line 20. 6 Enter the net total of each column as indicated teleprocess of the same amount of the saction 454(a) fax has been previously assessed 5 Christ the amount of prior years' undistributed encome for 2013. Subtract line 4 to from line 20. 5 Center the amount of prior years' undistributed encome for 2013. Subtract line 4 to from line 20. Taxable amount - see instructions 0 Undistributed income for 2014. Subtract line 4 to from line 2 to 15 Applied to 10 Amable amount - see instructions 0 Undistributed income for 2014. Subtract line 4 to from line 2 to 15 Applied to 10 Amable amount - see instructions 0 Undistributed income for 2014. Subtract line 4 to from line 2 to 15 Applied to 10 Amable amount - see instructions 0 Undistributed income for 2014. Subtract line 4 to from line 2 to 15 Applied to 10 Amable amount - see instructions 0 Undistributed and come for 2014. Subtract line 4 to 15 Amounts tested as distributions out of corpus to statisty requirements imposed by section 170(b)(f)(f) or 4942(g)(g) (Bettor may be required - see instructions 0 Undistributed income for 2014. Subtract lines 4 di not from line 5 to 10 Amable amount - see statistications carryover from 2009 not applied on line 5 or line 7 9 Excess from 2010 1 Applied 1 Applied 1				<u> </u>	
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Form 990-PF (2014)

C/O HERITAGE TRUST COMPANY

<u>23-7248893</u> Page 11

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Foundation Purpose of grant or show any relationship to Amount status of contribution any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year BEST FRIENDS OF PETS N/A CHARITABLE P.O. BOX 415 OKLAHOMA_CITY, OK 73101 5,000. COVENANT COMMUNITY CHURCH N/A RELIGIOUS 250 N. MUSTANG ROAD 15,000. YUKON OK 73099 RELIGIOUS/EDUCATIONAL S. W. COVENANT SCHOOLS N/A 2250 N. MUSTANG ROAD 15,000. YUKON OK 73099 **▶**_3a 35 000. Total b Approved for future payment NONE Total

423611 11-24-14

Form **990-PF** (2014)

Part XVI-A	Analy	reie of l	ncome-	Producino	Activities
Part AVI-A	Anaiy	/SIS OF I	ncome-	Producing	ACTIVITIES

					
Enter gross amounts unless otherwise indicated.	(a) Business	usiness income (b) Amount	(C) Exclu- sion	y section 512, 513, or 514 (d) Amount	(e) Related or exempt
1 Program service revenue: a b c d e f g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income	code	Amount	sion code	18,687.	function income
8 Gain or (loss) from sales of assets other than inventory9 Net income or (loss) from special events			14	10,067.	
11 Other revenue: a b c d					
6	· -			28,754.	0
12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e)	<u> </u>	0	<u></u>	13	
(See worksheet in line 13 instructions to verify calculations.)					<u> </u>
Part XVI-B Relationship of Activities Line No. Explain below how each activity for which inc the foundation's exempt purposes (other than	ome is reported in co n by providing funds	olumn (e) of Part XVI for such purposes).	-A contributed		dishment of
ACTIVITIES ARE LIMITED	TO INVES	TMENTS ON	LY		
23621					Form 990-DE (201

Form 990-PF (2014) C/O HERITAGE TRUST COMPANY 23-7248893 Page 13 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Yes No Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of: (1) Cash 1a(1) (2) Other assets X 1a(2) **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization 15(1) X (2) Purchases of assets from a noncharitable exempt organization 1b(2) X (3) Rental of facilities, equipment, or other assets 1b(3) X (4) Reimbursement arrangements 1b(4) X (5) Loans or loan guarantees 1b(5) X (6) Performance of services or membership or fundraising solicitations 1b(6) Sharing of facilities, equipment, mailing lists, other assets, or paid employees If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. (b) Amount involved (c) Name of noncharitable exempt organization (a) Line no (d) Description of transfers, transactions, and sharing arrangements N/A2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described Yes X No in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? If "Yes," complete the following schedule. (c) Description of relationship (a) Name of organization (b) Type of organization ive examined this return, including accompanying schedules and statements, and to the best of my knowledge May the IRS discuss this return with the preparer Sign shown below (see instr.)? Here X Yes Signature of officer or trustee Title Date Date Check [Print/Type preparer's name Preparer's signature self- employed Paid P00350282 KAREN ALLEN **Preparer** Firm's EIN ► 73-1078673 CHANDLER, Firm's name ► PETERS & **Use Only**

Form **990-PF** (2014)

(405)843-9371

Firm's address ▶ 2601 N.W. EXPRESSWAY 600 EAST

OKLA CITY, OK 73112

Part IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (c) Date acquired (mo., day, yr.) (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) 181.4520 AMERICAN BEACON 04/10/0604/09/15 P 50000 GOLDMAN SACHS GROUP INC 01/08/04|11/15/14 c 130 ISHARES TR INDEX P 10/25/1104/09/15 d 15 ISHARES TR INDEX P 02/22/1204/09/15 e 470 VANGUARD INTL EQUITY P 10/25/1112/11/14 f 175 VANGUARD INDEX FDS REIT ETF P 10/25/1112/11/14 g CAPITAL GAINS DIVIDENDS h m n 0 (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 3,974. 5,400 1,426. а 51,633. 50,000. <1,633.> b 15,044. <u>14,833.</u> <211.> C 1,782. 1,711. <71.> d 18,562. 19,054. <492.> е 9,779. 14,263. 4,484. f 6,564. 6,564 g h m n Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any 1,426. а <1,633.> b <211.> C <71.> d <492.> 4,484. 6,564. h m n 0 { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 } 10,067. 2 Capital gain net income or (net capital loss) 2 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 N/A

FORM 990-PF	DIVIDENDS	AND INTER	EST	FROM SECUR	ITIES S	TATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND		(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME		
CORPORATE INTEREST DIVIDENDS ON SECURITIES	5,406.	6,56		5,406.	5,406. 9,781.		
U.S. GOVERNMENT INTEREST	3,500.	-		•	3,500.		
TO PART I, LINE 4	25,251.	6,56	4. ====================================	18,687.	18,687.		
FORM 990-PF		LEGAL	FEI	ES	S'	TATEMENT	2
DESCRIPTION		(A) EXPENSES PER BOOKS			(C) ADJUSTED NET INCOME		
RAMSEY & GRAY PC		433.		433.	· ·		0.
TO FM 990-PF, PG 1, I	LN 16A	433.		433.			0.
FORM 990-PF		ACCOUNTI	NG F	'EES	S	PATEMENT	3
DESCRIPTION		(A) EXPENSES PER BOOKS	NET	INVEST-	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	
PETERS & CHANDLER		895.		895.			0.
TO FORM 990-PF, PG 1,	LN 16B	895.		895.			0.

FORM 990-PF	TAXES			STATEMENT 4		
DESCRIPTION	(A) (B) EXPENSES NET INVER PER BOOKS MENT INCO					
FEDERAL TAXES FEDERAL ESTIMATES	591. 600.		0.			0.
TO FORM 990-PF, PG 1, LN 18	1,191.		0.			0.
FORM 990-PF	CORPORAT	E BONDS			STATEMENT	5
DESCRIPTION			BOOL	K VALUE	FAIR MARKE VALUE	T
CORPORATE BONDS & NOTES			102,931.		106,956.	
TOTAL TO FORM 990-PF, PART II, LINE 10C			102,931.		106,956.	
ORM 990-PF OTHER INVESTMENTS					STATEMENT	6
DESCRIPTION	VALUATION METHOD		воон	(VALUE	FAIR MARKE	T
FHLB FFCB MUTUAL FUNDS	j	FMV FMV		51,347. 35,741. 418,219.	55,5 35,4 437,7	15.
TOTAL TO FORM 990-PF, PART II	, LINE 13			505,307.	528,6	92.